

## Job Aid: Recording a Learning Event

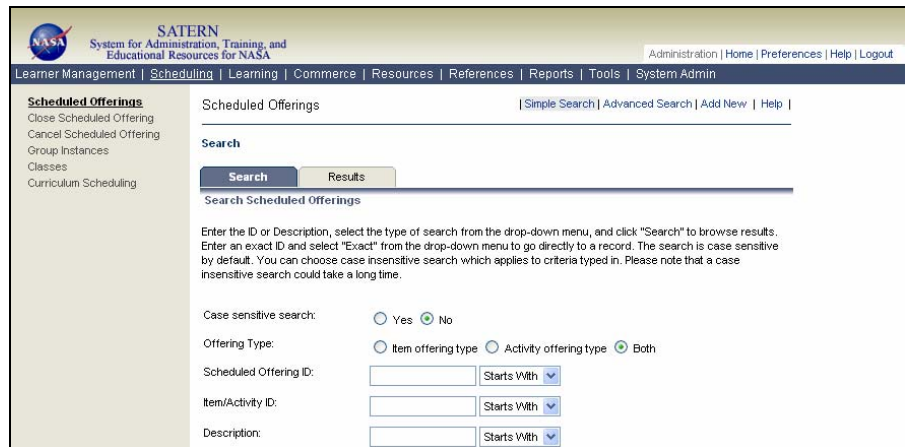
### Tasks

- A. Verify accuracy of custom fields
- B. Verify Vendor record exists in Organizations table
- C. Use Learning Event Recorder to record completion

### Task A: Verify Accuracy of the Custom Fields in a Scheduled Offering

1. Click **Scheduling > Scheduled Offerings**

**Step 1:** Search for and access in **Edit** mode the Scheduled Offering record.



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Learner Management | **Scheduling** | Learning | Commerce | Resources | References | Reports | Tools | System Admin

**Scheduled Offerings** | Simple Search | Advanced Search | Add New | Help

**Search**

Search Scheduled Offerings

Enter the ID or Description, select the type of search from the drop-down menu, and click "Search" to browse results. Enter an exact ID and select "Exact" from the drop-down menu to go directly to a record. The search is case sensitive by default. You can choose case insensitive search which applies to criteria typed in. Please note that a case insensitive search could take a long time.

Case sensitive search: ☐ Yes ☒ No

Offering Type: ☐ Item offering type ☐ Activity offering type ☒ Both

Scheduled Offering ID:  Starts With

Item/Activity ID:  Starts With

Description:  Starts With

2. **Step 2:** Click the Custom Fields tab of the Scheduled Offering record.

Verify the accuracy of these fields, especially the **Per Participant Cost**.

If any changes are made, click the **Apply Changes** button.



Standard Options

Notifications Cost Calculation Cost Summary Pricing Catalog Chargeback

Summary Segments Registration Contacts Materials **Custom Fields**

Edit the Custom Fields for the Scheduled Offering

Apply Changes Reset

Column	Label	Value	Description
1	On Duty Hours	16.0	
2	Off Duty Hours		
3	Purpose of Training	03	Improve Present Performance
4	Type of Training	01	Training Program Area
5	Type of Training Sub-Code	08	Information Technology
6	Source of Training	03	Non-government
7	Special Interest Code	0A	No Special Program
8	Academic Credit Code	05	N/A
9	Training Credit Type Code	03	Continuing Education Unit
10	Direct Cost Code	C	Contract - Funded by Center
11	Per Participant Cost	250.00	
12	Books & Materials Cost		
13	Other Direct Cost		
14	Indirect Cost Code	0	No Indirect Cost
15	Travel		
16	Per Diem		
17	PO Number	NNJ05JD43P	
18	Category Code	B	
19	Sub Category Code	A	
20	Funding Organization	AH3	
21	POC	JASON NELSON	
22	Budget Line Item		

3. **Step 3:** Click the Registration tab.

Notifications	Cost Calculation	Cost Summary	Pricing	Catalog	Chargeback
Summary	Segments	<b>Registration</b>	Contacts	Materials	Custom Fields

4. **Step 3:** Scroll down to view the registrants list. If the Custom Fields vary per participant for this offering, click the **Edit** link below each Learner's name.

If the learner cancelled or is a no show, click the **Edit** link under the Status to change the Learner's Registration Status prior to the LER.

**Edit the Registered Learners for the Scheduled Offering**

[Select All / Deselect All](#)  
[Apply Changes](#)

Learner	Registration Status	Slot ID	Chargeback	Remove
C-rnwbeaumont BEAUMONT, NANCY W <a href="#">Edit</a>	ENROLL (Enrolled) 5/12/2006 11:57 AM EST <a href="#">Edit</a>		Account(s): Price (\$): Order Ticket: <a href="#">Edit</a>	<input type="checkbox"/>
jmbary ABARY, JONATHAN M <a href="#">Edit</a>	ENROLL (Enrolled) 5/12/2006 01:24 PM EST <a href="#">Edit</a>		Account(s): Price (\$): Order Ticket: <a href="#">Edit</a>	<input type="checkbox"/>

5. **Step 4:** These Custom Fields are populated by the Item Custom Fields tab.

Verify the accuracy of these fields, and make any necessary changes.

If any changes are made, click the **Apply Changes** button.

[Back to Main Record](#)

Notifications	Cost Calculation	Cost Summary	Pricing	Catalog	Chargeback
Summary	Segments	<b>Registration</b>	Contacts	Materials	Custom Fields

**Edit Registered Learner Details for Scheduled Offering 42**

Learner ID: C-rnwbeaumont      Learner Name: BEAUMONT, NANCY W

Label	Value	Description
Purpose of Training	03	Improve Present Performance
Special Interest Code	0A	No Special Program
Per Participant Cost	250.00	
Travel		
Per Diem		
PO Number	NNJ05J043P	

## Task B: Verify Vendor record exists in the Organizations table

1. From the **References** menu, select **Organizations**.

**Step 1:** Search for the **Vendor** by entering the Vendor name in the Description field. Change the operator to 'contains' and click the Search button.

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Cost Names  
Assignment Profiles  
Approval Process  
Approval Roles  
IDP Templates  
Job Positions  
Documents  
**Organizations**  
Organization Groups  
Tasks  
+ General References

Organizations [Simple Search](#) [Advanced Search](#) [Add New](#) [Help](#)

**Search**

Search Organizations

Enter the ID or Description, select the type of search from the drop-down menu, and click "Search" to browse results. Enter an exact ID and select "Exact" from the drop-down menu to go directly to a record. The search is case sensitive by default. You can choose case insensitive search which applies to criteria typed in. Please note that a case insensitive search could take a long time.

2. If the Vendor record exists, go to Task C. If the Vendor record has not been entered in SATERN, you must create the new Vendor record.

> Search Results

Search Results

View Organization Results

Organization ID	Description	
DFRC-INDIAN WESLEYAN UNIV	Indiana Wesleyan Univ.	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
GRC-6209	INDIANA DEPARTMENT OF COMMERCE	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
GRC-7199	INDIANA SPACE GRANT CONSORTIUM	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
GSFC-IUP	INDIANA UNIVERSITY OF PENNSYLV	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
HQ-IU	Indiana University	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
JSC-S-INDUNIV	Indiana University	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
KSC-MMU	INDIANA WESLEYAN UNIV	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
LARC-IU	Indiana University	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>

3. **Step 2:** Click the **add new** link.

[Simple Search](#) | [Advanced Search](#) | [Add New](#) | [Help](#)

4. **Step 3:** Create a Root Level Organization: Enter the Organization (Vendor) ID and Description. Place the record in the appropriate Domain.

Click the **Add** button.

Add New Organization

\* = Required Fields

Add

Add Root Level Organization

Enter **Root Organization ID**, **Description**, and click **Add** to add the new **Root Organization**.

\* Organization ID:

Description:

\* Domain:

5. **Step 4:** On the new Organization record Summary tab, change the Organization Type to **VENDOR**.

Click the **Apply Changes** button.

Catalog Preview

Summary Custom Fields Learners Slots Account Code Commerce

Edit the Organization Information

To make the selected organization to a **Root Organization Status**, check the corresponding checkbox, and click **Apply Changes**. To make the selected organization the child of another organization, click the **picker**, or enter an organization ID, and click **Apply Changes**. To add or change the **Organization Type** to the selected organization, click the **picker**, and then click **Apply Changes**. Click **Reset** to revert to system default.

Apply Changes Reset Delete

Organization Description:

Organization Type:

### Task C: Use Learning Event Recorder to record completion

1. Click **Learner Management > Learning Event Recorder**

**Step 1:** Select the **Scheduled Offering** radio button.

Click the **Next** button.

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Learners Learning Event Editor **Learning Event Recorder** Competency Assessment Editor Competency Assessment Recorder Learner Needs Mgmt

Learning Event Recorder

> Step 1

Step 1: Select Event Type

☒ Item ☐ External Event ☐ Scheduled Offering

Next

2. **Step 2:** Enter the Scheduled Offering ID, or search for the Offering using the 🔍.

Once the Offering is selected, click the **Next** button.

**Step 2: Select Scheduled Offering**

[Previous](#) [Next](#)

\* = Required Fields

\* Scheduled Offering ID: 🔍

3. **Step 3:** Use the 🔍 to search for and select an **Instructor**. **Note:** The name you enter will be in history and on the certificate. Otherwise, it will default to the Agency Training Officer.

Use the 🔍 to search for and select the **Vendor**.

Choose a **Default Completion Status**.

Click the **Next** button.

**Step 3: Enter Learning Event Information**

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\* = Required Fields

Item: COURSE JSC-CS-VISIO2003BA (Rev 5/4/2006 01:57 PM EST)  
Item Title: VISIO 2003 BASIC & ADVANCED

Instructor: 🔍 \*None Specified,\*

Training Vendor: 🔍 JSC-ACC

Default Grade:

\* Default Completion Status: COURSE\_COMP (Completed) - For Credit

Completion Date: 5/10/2006 05:00 PM EST

Default Price (\$): (1000,001.01)

Total Hours: (1000,001.01)

Credit Hours: (1000,001.01)

Contact Hours: (1000,001.01)

CPE: (1000,001.01)

4. **Step 4:** Learners who were enrolled in the Offering will pre-populate the Select Learners screen.

Click the **Next** button.

**Step 4: Select Learners**

[Previous](#) [Next](#)

\* = Required Fields

**Add Learners**

Enter Learner ID or [add one or more from list](#)

\* User Name:  [Add](#)

**Edit Selected Learners**

[Apply Changes](#)

[Select All](#) / [Deselect All](#)

User Name	Name	Remove
C-nwbeaumont	BEAUMONT, NANCY W	<input type="checkbox"/>
jmabary	ABARY, JONATHAN M	<input type="checkbox"/>

[Select All](#) / [Deselect All](#)

[Apply Changes](#)

5. **Step 5:** Change the **Completion Status** if necessary.

Click the **Next** button.

Learner	Comments	Grade	Status
C-nwbeaumont ( BEAUMONT, NANCY W)			COURSE_COMP (Completed) - For Credit
jmabary (ABARY, JONATHAN M)			COURSE_COMP (Completed) - For Credit

6. **Step 6:** Skip the financial summary screen by clicking the **Next** button.

**Note:** Financial information is captured in SATERN in the Custom Fields.

Learner	Price (\$) (1000,001.01)	Cost Center Account Codes	Profit Center Account Codes	Order Ticket
C-nwbeaumont ( BEAUMONT, NANCY W)	0.00			
		<a href="#">Edit</a>		
jmabary (ABARY, JONATHAN M)	0.00			
		<a href="#">Edit</a>		

7. **Step 7:** Confirm Learning Event Details.

Click the **Finish** button.

**Step 7: Record Event**
[Previous](#)
[Finish](#)

Scheduled Offering ID: 42

Item: COURSE JSC-CS-VISIO2003BA (Rev 5/4/2006 01:57 PM EST)

Item Title: VISIO 2003 BASIC & ADVANCED

Instructor: \*None Specified, \*

Completion Date: 5/10/2006 05:00 PM EST Total Hours: 16.00 Default Tuition: 0.00

Contact Hours: CPE: Credit Hours:

Automatically Assess Related Competencies: ☐

Learner	Status	Grade	Price (\$)	Cost Centers	Profit Centers	Order Ticket
C-nwbeaumont ( BEAUMONT, NANCY W)	COURSE_COMP (Completed)		0.00			
Comments:						
jmabary (ABARY, JONATHAN M)	COURSE_COMP (Completed)		0.00			
Comments:						

8. After completion, you may print **Completion Certificates** or email PDF versions to the Learners with the **Print** and **Email** buttons.

**Finished**

**Status:**

- The learning event has been successfully recorded.

[Start Over...](#)

**Generate Completion Certificates**

Learning event that provide credits have been successfully recorded for the following learner(s).

User Name	Name
C-nwbeaumont	BEAUMONT, NANCY W
jmabary	ABARY, JONATHAN M

[Print](#) [Email...](#)